



General Service Administration (GSA)
Information Technology (IT)
Office of the Chief Information Office (OCIO)

**GSA Schedule 70
Blanket Purchase Agreement
for
IT Research Services**

**Statement of Work (SOW)
and
Request for Quote (RFQ) No. ID14160080**

February 5, 2016

1.0 Objective

The overall objective of this procurement is to award a multiple award blanket purchase agreement to obtain access to memberships, research and advisory services to assist GSA with the formulation of Information Technology (IT) strategies, business management of IT, application integration, enterprise management strategies, and emerging trends in IT strategic systems alignment.

2.0 Background

Various task orders have provided research services to GSAIT, Services and Staff Offices over the past several years. These services have provided GSAIT with a full breadth of expertise and advisory services from strategic to tactical and operational levels. At the strategic level, GSA received access to industry/government databases providing impartial, statistically-valid assessments and advice for the Agency allowing for long-term planning. At the tactical level, GSA received uniquely-accessible research capabilities to help the Agency face more near-term planning and adjust to changing technology and external requirements and constraints. The operational level, allowed GSA IT professionals to seek advice in very tangible terms--such as decision-making tools--that speak to the day-to-day, operational business matters. In addition, the overall research services provided significant consultative resources for IT planning and management. Therefore all the services fulfilled essential functional areas in the totality of the Government's need.

Currently, GSAIT holds awards for research services providing support to multiple organizations within GSA to include FAS, OCSIT, OGP, CPO, PBS and OMB. The current award expires March 31, 2016.

Invitations to this Request for Quote (RFQ) shall be to current GSA Schedule 70 holders.

3.0 Scope

The scope is to establish a multiple award blanket purchase agreement (BPA) in an effort to accommodate GSA IT professional research service needs through one or more separate companies with the flexibility of hybrid price task orders covering the same functional areas of the research service marketplace.

These services shall obtain memberships that provide GSA IT with the following benefits:

- Improve project management of IT projects
- Improve availability and planning of technology implementations
- Improve GSA's technology investment and planning processes
- Acquire, implement, and manage technology to meet current and future business requirements
- Conduct comparative benchmarks of IT performance
- Advance the utilization of technology
- Improve the management of vendors
- Increase the return on technology investments
- Understand the impact of technological advances on future organizational activities and outcomes

4.0 Requirements

The vendor shall provide services in the following functional areas:

4.0.1 Functional Service Areas

The offeror must provide Functional Area 1 Membership/Licenses in order to deliver supporting services in Functional Area 2.

4.0.1.1 Functional Area 1: Firm Fixed Price Memberships/Licenses: Access to all offered research via memberships to include:

- a. Analyst access to amplify, clarify and provide in-depth information on the research published or performed specifically for the Government
- b. Unlimited access to all IT-focused written Technology Research
- c. Unlimited Web-based access to IT-focused research documents via the Contractor's subscription services covering the entire realm of IT from hardware to software, from strategic planning to human capital management including reports on

technology manufacturers and service provider's abilities to deliver specific technology, product testing and product evaluations.

- d. Unlimited access to IT Research Reports and Analysts, Document reviews and written guidance
- e. White papers
- f. Professional development
- g. Customized Web Portal
- h. Client Driven Research
- i. Research Inquiry
- j. Analyst Inquiry
- k. IT Document Review
- l. Unlimited access to a research tool on a continuous basis via the Internet using a standard Web browser.
- m. Provide the necessary personnel, facilities, equipment, materials, and services to make the research tool available to GSA users.
- n. Provide access to all the latest documents which may be added to the contractor's database subscription during the term of this contract at no additional cost to the Government.
- o. Unlimited printing and downloading of retrieved documents at no additional charge, including all available PDF formats, subject to copyright and licensing restrictions in the schedule contract.
- p. Be available to all authorized users 24-hours-a-day, 7-days-a-week, and 365-days-a-year. "Available" is defined as the system allowing any authorized user to log onto the Contractor's system, search any database file(s), and retrieve and download the requested information.
- q. Customer support and technical assistance on the research tool which includes but not limited to, answer questions concerning research strategies, database fields, software usage, and other types of questions related to the use of the research tool and the content of the databases.
- r. Assistance to users located within the United States. Customer Support shall be provided by toll-free call within the United States, including Hawaii and Alaska.. Calls received outside of the caller's normal business hours, typically 8:00 am – 5:00 pm local time, will be returned by the next business day.

4.0.1.2 Functional Area 2: Research-based Advisory Analytical and Benchmarking Services

- a. Research-based Advisory engagement to apply research and best practices to meet GSA's specific IT business challenges. This will include features that are not included in the base memberships: document reviews, white papers, various IT subject matter experts, market assessments, peer reviews, workshop facilitation and IT advisory consulting hours, research based analysis, a comprehensive online database of research and written research to provide answers to common problems faced by decision makers across both public and private sectors from around the world.

- b. Analysis on current insight and expertise on industry trends, market and business strategies, architecture, strategic planning enterprise applications, technical insight, human capital strategies, portfolio management, performance management, cost reduction methodologies, business case analyses, vendor management, contract negotiation strategies, and a variety of ad hoc request. Current and accurate information on information technology-related topics that are used by GSA to make informed decisions on IT management, technology investments, technology enhancements, and IT security issues.

5.0 Deliverables

All deliverables will be identified at the BPA Call level. All deliverables shall be provided to the BPA Call Contractor Officer Representative (COR) according to agreed upon timeframes. The following table includes BPA level deliverables to be delivered to identified COR according to the agreed upon delivery dates. An electronic media copy of each written deliverable shall be delivered in Microsoft Word/Excel format.

Deliverable Type	Estimated Delivery Timeline
Kick-off Meeting	DOA plus 5 days
Quarterly Performance Review Meeting	Date of Award plus 3 months
Quarterly Performance Review Reports	Date of Award plus 3 months

6.0 Ordering Procedures

In addition, the ordering activity may further set-aside Task Orders within BPA holders in accordance with FAR 8.50453(c) (a)(1)(i). In instances where an expedited response is requested, contractors should anticipate rapid response times, as little as 48 hours.

6.1 Authorized BPA Users

The primary ordering activity under this BPA will be the Office of Administrative Services (OAS), Internal Acquisition Division (IAD). However, the IAD may further delegate procurement authority to any GSA warranted Contracting Officer.

7.0 Contract Type

Pricing will be based on Schedule 70, fixed unit price, fixed labor category rates. BPA labor rates are expected to be further discounted from the Schedule 70 listing.

Task Orders issued under the BPA will be inclusive of the following type, inclusive of a mixture of them (hybrid):

- Firm-Fixed Price (FFP)
- Labor Hour (LH)

- Time and Materials (T&M)

Price (FFP) orders are preferred as stated in FAR 8.4053(c)(3). The Government may place FFP or T&M/LH task orders. T&M/LH orders can only be placed if justified in writing IAW FAR 8.404(h).

8.0 PERIOD OF PERFORMANCE

The period of performance (POP) is from date of award through five years.

9.0 Place of Performance

The place of performance shall be the Contractor's designated worksite or as identified in the BPA call task order.

10.0 Government Furnished Resources and Equipment: None provided.

11.0 SECURITY REQUIREMENTS

11.1 Security Special Requirements: No special requirements needed - contractor(s) will not need access to systems.

11.2 Section 508 Requirements: Requirements for accessibility based on [Section 508 of the Rehabilitation Act of 1973](#) (29 U.S.C. 794d) are determined as applicable to this acquisition based on the following technical provisions: The Section 508 Compliance Statement will be assessed on an Acceptable/Unacceptable basis only. Failure to state compliance to the Section 508 requirements will result in the Offeror being ineligible for award with no further evaluation of the technical and pricing proposal accomplished by the Government.

11.3 Information Content Deliverable: To understand the technical standards that apply to each provision, the respondent should refer to Section 508.gov at <http://section508.gov/index.cfm?fuseAction=stdsdoc>. Offerors must also describe how their proposed Electronic and Information Technology (EIT) deliverables meet at least the performance criteria identified above, as applicable. The government requires the offerors to submit the [Voluntary Product Accessibility Template](#) (VPAT). The VPAT will inform the government on how the respondent proposed solution conforms to the applicable Section 508 requirements.

11.4 Potential for Organizational and Personal Conflicts of Interest

11.4.1 The contractor's attention is directed to FAR Subpart 9.5, Organizational Conflicts of Interest. In the execution of certain contract tasks, it is anticipated that assigned contract personnel will require access to confidential or proprietary business, technical, financial information belonging to the Government or other companies, including pre-decisional budget and acquisition sensitive information. After receipt thereof, the Contractor and affected individuals shall treat such information as

confidential and agree not to appropriate such information to its own use or to disclose such information to third parties unless specifically authorized by the Contracting Officer in writing. The foregoing obligations, however, do not apply to:

1. Information which, at the time of receipt by the Contractor, is in the public domain;
2. Information which is published after receipt thereof by the Contractor or otherwise becomes part of the public domain through no fault of the Contractor;
3. Information which the Contractor can demonstrate was in his possession at the time of receipt thereof and was not acquired directly or indirectly from the Government or other companies; and,
4. Information, which the contractor can demonstrate, was received by it from a third party that did not require the Contractor to hold it in confidence.

11.4.2 The Contractor shall obtain the written agreement, in a form satisfactory to the Contracting Officer, of each employee permitted access, whereby the employee agrees that he will not discuss, divulge or disclose any such information or data to any person or entity except those persons within the Contractor's organization directly concerned with the performance of the contract.

11.4.3 The Contractor agrees, if requested by the Government, to sign an agreement identical, in all material respects, to the provisions of this clause, with each company supplying information to the Contractor under this contract, and to supply a copy of such agreement to the Contracting Officer. From time to time upon request of the Contracting Officer, the Contractor shall supply the Government with reports itemizing information received as confidential, proprietary, pre-decisional budget information, or acquisition sensitive information, and setting forth the company or companies from which the Contractor received such information.

11.4.4 The contractor agrees that upon request by the Contracting Officer it will execute a Contracting Officer approved agreement with any party whose facilities or proprietary data it is given access to or is furnished, restricting use and disclosure of the data or the information obtained from the facilities. Upon request by the Contracting Officer, Contractor personnel shall also sign such an agreement.

These provisions shall flow down to all subcontracts and teaming agreements.

12.0 Intellectual Property Rights

The existence of any patent, patent application or other intellectual property right that encumbers any deliverable must be disclosed in writing in the cover letter that accompanies the delivery. If no such disclosures are provided, it is assumed that the no intellectual property rights apply.

13.0 TRAVEL

Travel may be required under this BPA and will be specified at the individual task order level. Local travel may be deemed necessary. Local travel will not be reimbursed. All travel must be pre-approved by the COR at the task order level. For reference on travel regulations please see Federal Acquisition Regulation 31.205-46 – travel cost.

14.0 OFFER SUBMISSION INSTRUCTIONS

In response to this SOW, Offeror must prepare and deliver technical and price proposals that will be evaluated to determine the “Best Value” proposal.

It should be noted that this BPA may be awarded to one or more vendors who are deemed qualified for the general scope of work. The award of the BPA does not guarantee the award of any task order to any one vendor; rather each identified task order will be competed among the vendors.

Identify if pre-paid research is offered for example, how many research hours are included in a standard block of research, limitations of research topics, and any expectations or assumptions in the technical proposal. The cost for a single block of research services, structured in accordance with the proposed solutions, must be included in the price proposal.

Proposals shall be submitted to the Contracting Officer through eBuy on February 17, 2016 , 10:00 A.M., as follows:

Offeror’s shall submit a separate package for each proposal: Technical and Price.
Offeror’s shall submit the Technical and Price proposals in an electronic form via eBuy.

14.1 Responses: Offerors will respond to the requirements in this RFQ/SOW indicating what research services are offered that satisfy the GSA IT requirements and indicating which functional area (s) is being fulfilled. The offer should identify the relevant GSA schedule contract number, SIN, NAICS and terms and conditions.

14.1.1 The **total** technical proposal inclusive of all content must not exceed 20 pages which equal 10 double-sided sheets of paper. Inclusive are of text, graphics, past performance references, and responses to Functional area 1 and Functional area 2. Text must be in a font equivalent to Times New Roman, Font 12, or larger. Graphics may be in a format as selected by the

contractor however compatible to Microsoft office suite. Total pages for response to each functional area shall not exceed 12 pages which equal to Six (6) double-sided sheets of paper. Proposal pages exceeding the page limits will not be evaluated.

Note: One double-sided sheet of paper is equivalent to 2 single-sided sheets of paper of printed material.

14.1.2 Electronic responses are due by 10:00 A.M. on 2/17/2016. (No oral presentations will be required or used. No demonstrations will be required or used.)

14.1.3 Any questions or clarifications must be submitted by 09:00 A.M. on February 9, 2016.

14.1.4 Questions/clarifications and proposals should be submitted to diane.taylor@gsa.gov by the date and time specified to be considered.

14.1.5 Offers must be in two separate volumes, technical and price. The technical must be sanitized of any pricing information.

14.2 TECHNICAL PROPOSAL

14.2.1 Technical Factors: The Offeror shall address the following technical factors in their proposal:

Factor 1: Technical Capability to include a complete list of offered Memberships and Advisory Services.

Factor 2: Management Approach to include Key Personnel
Offeror must have a current GSA Schedule Pricelist. Offeror must submit the resume of the BPA Program Manager, and designate this person as key personnel.

Factor 3: Corporate Experience to include Past Performance.

The technical proposal factors are listed in descending order of importance. Technical capability is significantly more important than price; however, as competing technical proposals are evaluated as more equal in merit, price becomes more important.

14.2.1.1 FACTOR 1: TECHNICAL CAPABILITY (12 page limit - 6 double-sided)

The Offeror's Technical Capability shall address memberships, and research based advisory analytical benchmarking services. The offeror's technical capability shall describe:

1. Comprehensive list of available Memberships and what each membership provides as referenced in Section 4.0.1.1. The offeror MUST provide

Functional Area 1 in order to deliver supporting services to Functional Area 2.

2. Depth and breadth to include but not limited to online database of research, written white paper research and peer reviews as referenced in Section 4.0.1.2.

14.2.2 FACTOR 2: MANAGEMENT APPROACH (4 page limit- 2 double sided)

The Offeror shall clearly describe its relevant management approach in fulfilling the technical capabilities identified in the SOW 4.0.1.1 (Membership Services) and 4.0.1.2 (Research-based Advisory Analytical and Benchmarking Services).

The Offeror shall:

1. Describe approach to providing membership services
2. Describe approach for fulfilling analytical services and benchmarking services
3. Describe staffing plan and approach

14.2.3 FACTOR 3: CORPORATE EXPERIENCE (4 page limit- 2 double sided)

The Offeror's Corporate Experience shall demonstrate a minimum of three years (3) relevant past performance experience, with assisting Federal Government agencies or companies similar in scope to the type of work described in the SOW section 4.0.1.1 and 4.0.1.2.

14.2.4 FACTOR 4: Price Proposal

The price proposal for this BPA should only consist of the following:

For Services/Membership: Vendor's GSA Schedule for applicable labor categories and memberships to include discounts being offered, for each fiscal year. The contractor shall propose off-site rates (contractor facility), and GSA/CIO will determine at each task order award whether the efforts best meet its needs. If the Vendor does not have a Schedule rate for any labor category requested, the Vendor must take the initiative to add this labor category to its GSA schedule prior to submission of its BPA proposal.

15.0 EVALUATION CRITERIA

Basis of Evaluation

The Government will evaluate the written submission to arrive at a rating for the technical evaluation factors as a whole.

The Government will evaluate the pre-paid research service prior to award and include annual research hours in the base and option years, if applicable.

Scoring Guidelines

Each technical factor will be evaluated using adjectival ratings; excellent, good, acceptable, and unacceptable.

Evaluate Technical Factors: The technical factors will be evaluated as follows:

The Government will evaluate the Technical factors one through three, based on the Offeror's general capability to perform the work required by GSA and the Offeror's specific GSA knowledge and experience, demonstrated understanding of the requirements of the functional areas, appropriateness of the proposed personnel, and the experience of the Offeror with similar specific tasks.

15.1.1 Factor 1: Technical capability (12 page limit which equals 6 double-sided pages)

The Offeror's Technical Capability shall be evaluated on memberships, and research based advisory analytical benchmarking services. The offeror's technical capability shall describe:

1. Comprehensive list of available Memberships and what each membership provides as referenced in Section 4.0.1.1.
2. Depth and breadth to include but not limited to online database of research, written white paper research and peer reviews as referenced in Section 4.0.1.2.

15.1.2 Factor 2: Management Approach (4 page limit equal 2 double-sided pages)

The Government will evaluate its relevant management approach in fulfilling the technical capabilities identified in the SOW 4.0.1.1 (Membership Services) and 4.0.1.2 (Research-based Advisory Analytical and Benchmarking Services) on the following within the offerors proposal:

1. Describe approach to providing membership services
2. Describe approach for fulfilling analytical services and benchmarking services
3. Describe staffing plan and approach

15.1.3 Factor 3: Corporate Experience (4 page limit equal 2 double-sided pages)

The Government will evaluate the Offeror's Corporate Experience based on the relevant past performance experience, with assisting Federal Government agencies or companies similar in scope to the type of work described in the SOW section 4.0.1.1 and 4.0.1.2.

15.1.4 Factor 4: Price Proposal

Offeror's pricing will be evaluated, including any discounts offered by contractors off of their existing IT 70 Schedule pricing.

Offeror's are encouraged to offer discounts below schedule contract and/or open market rates; whichever is applicable. When discounts are offered, proposals must clearly identify both the schedule contract or open market price and the discount price for services/memberships and benchmarking.

If offered, the Government will evaluate the extent of the benchmarking service and the cost prior to award. The cost for a single benchmark engagement, in accordance with the specified parameters must be included in the price proposal.

Prices will be evaluated to determine price reasonableness and applicability to the requirements.

16.0 METHOD for AWARD

Award will be based on the best value to the Government, price and other price-related factors considered. Award will be made without discussion. However, the Government may conduct discussions if determined necessary. If so, a final revised proposal shall be submitted to the CO upon completion of discussions. All terms and conditions of the contractor's IT 70 Schedule contract apply.

Award will be made to the contractor(s) that represent the best value to the Government. The government will award one or more orders to provide a comprehensive service offering covering all of the required niches.

The Government reserves the right to award without discussion or clarifications, except for clarifications that may be needed to clarify some aspect of an offeror's proposal. Clarifications with one offeror does not obligate the Government to participate in clarifications with all offerors.

17.0 ASSUMPTIONS

All assumptions shall be evaluated as part of the individual factor to which they apply. The Government reserves the right to reject any proposal that includes any assumption that may impact satisfying the Government's requirements.